友邦香港
香港北角電氣道 183 號
友邦廣場 12 樓

AIA Hong Kong
12/F, AIA Tower
183 Electric Road
North Point
Hong Kong

Memo

Attn:	All EDD & Honourable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong and Macau)	From:	Winnie Fung
Copy:	Mr. Alger Fung / Ms. Amelie Shen / Ms. Amy Chan / Mr. Louie Ho / All Department Heads / ABDD Executives / CSBD Agency Executives / IVS Executives / Contact Centre	Dept:	Corporate Solutions
Date:	01 January 2026	Total pages:	4

Subject: **(A260104)「友愛護」癌症保障計劃 —「限時特別申請期」**
Shield Up Cancer Protection Plan – "Limited-time Special Application"

「友愛護」癌症保障計劃（「友愛護」）「限時特別申請期」現**推出新一輪推廣期（2026 年 1 月 1 日至 3 月 31 日）**。立即把握 IVS 銷售良機！

「友愛護」「特別投保安排」最新推廣詳情如下：

<table>
<tr><td>推廣期：</td><td>2026 年 1 月 1 日 至 3 月 31 日</td></tr>
<tr><td>合資格客戶：</td><td>1) 於申請時為 AIA 團體保險計劃僱員成員及 / 或;
2) 於 2025 年 12 月 31 日及申請時為 AIA 強積金計劃 [1,6] / 職業退休計劃 [1,6] / 澳門退休金計劃 [2] 僱主計劃僱員成員及 / 或;
3) 於 2025 年 12 月 31 日及申請時為 AIA 強積金計劃 [1] / 職業退休計劃 [1] / 澳門退休金計劃 [2] 成員賬戶持有人 [3-6]

包括：
<table><tr><td>- AIA 強積金個人賬戶計劃 [7]</td><td>- AIA 職業退休計劃遞延成員賬戶</td></tr><tr><td>- AIA 強積金退休樂計劃</td><td>- 自僱人士賬戶</td></tr><tr><td>- AIA 強積金可扣稅自願性供款計劃</td><td>- 澳門友邦保險私人退休金及非強制性中央公積金個人計劃</td></tr></table>
註：
1. 只適用於香港
2. 只適用於澳門
3. 「友愛護」之服務營業員必須為強積金計劃 / 職業退休計劃 / 澳門退休金計劃成員賬戶之服務營業員並且須持有相關保險牌照才可銷售保險產品
4. 成員可於投保「友愛護」前，透過 AIA+（約 13 個工作天）或遞交「專屬顧問之委任信」（約 1 個月）轉換服務營業員
5. 如成員於 AIA+（只適用於香港）或指定二維碼 / 連結投保，該個案將會被計入團體保險計劃之服務營業員之個案
6. 按此參閱應做與不應做
7. 包括「休悠樂」個人賬戶計劃、客戶尊享強積金個人賬戶計劃及遞延成員賬戶</td></tr>
<tr><td>推廣範本：</td><td>最新「友愛護」推廣電郵範本已上載至營業員專頁，以供營業同事隨時下載並分享給僱主 / 人力資源部，讓其轉發給僱員，掌握最新客戶優惠。

<u>只適用於團體保險成員</u>：
路徑： eAC > 部門資訊 > 企業業務部 > 僱員福利友邦業務代表專區 > 營業員活動概覽 > 營銷推廣 > Worksite Marketing > Worksite Marketing 推廣工具
1)「友愛護」推廣電郵範本—人力資源部版本（按此查看）
2)「友愛護」推廣電郵範本—僱員版本（按此查看）
3)「友愛護」宣傳海報範本（按此查看）

<u>只適用於強積金 / 職業退休計劃 /澳門退休金計劃成員：</u>
路徑： eAC > 相關鏈接 > MPF > 工具 > 常用資訊
1)「友愛護」推廣電郵範本—人力資源部版本（按此查看）
2)「友愛護」推廣電郵範本—僱員版本（按此查看）
3)「友愛護」宣傳海報範本（按此查看）

營業員必須已完成「友愛護」癌症保障計劃線上學習及內部牌照評測（路徑：iAcademy > 網上學習 > 內部牌照 > 企業業務產品 >「友愛護」癌症保障計劃線上學習及內部牌照評測）</td></tr>
</table>

「AIA」、「友邦」或「友邦香港」是指友邦保險（國際）有限公司（於百慕達註冊成立之有限公司）。
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成員 AIA+網上投保步驟：	詳情請按此參閱
營業員 iPoS 填表步驟：	詳情請按此參閱
重要提示：	**根據友邦保險個人資料收集聲明（PICS），有關友邦保險集團公司在提供任何強積金及公積金相關服務時收集的任何個人資料，該等個人資料只會用於推廣或營銷任何強積金及公積金產品或服務。強積金及公積金客戶的資料是分別用作提供相關強積金或公積金的服務。請注意（一）不應該向其他人士披露客戶的資料作非強積金或公積金職能用途；（二）不應該將客戶的資料用於交叉銷售任何強積金或公積金計劃以外的產品或服務。** **不可直接或間接向客戶提供任何禮物及優待誘使客戶加入友邦強積金及購買友邦保險產品。**

如有任何查詢，歡迎與負責 貴區之企業業務營業拓展部同事 / IVS 團隊聯絡。

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"Limited-time Special Application" of **Shield Up Cancer Protection Plan ("Shield Up")** is now launching a new round of promotion period (1 January to 31 March 2026). Seize the IVS sales opportunities now!

Latest Promotion Details of "**Shield Up**" "**Limited-time Special Application**" are as follows:

<table>
<tr><td>Promotion Period:</td><td>1 January to 31 March 2026</td></tr>
<tr><td>Eligible Customers:</td><td>1) AIA group insurance scheme employee members at the time of application and /or;
2) An employee member of an employer plan under AIA MPF [1,6] / ORSO [1,6]/ Macau Pension scheme [2] on 31 December 2025 and at the time of application and /or;
3) AIA MPF[1] / ORSO [1] / Macau Pension [2] member account holders [3-6] on 31 December 2025 and at the time of application

Including:<table><tr><td>- AIA MPF Personal Account Programme [7]</td><td>- AIA ORSO Deferred Member Account</td></tr><tr><td>- AIA MPF Happy Retirement Savings Programme</td><td>- Self-employed Person Account</td></tr><tr><td>- AIA MPF Tax Deductible Voluntary Contribution Programme</td><td>- AIA Macau Private Pension Fund and Non-Mandatory Central Provident Fund Individual Scheme</td></tr></table>Remarks:
1. Only applicable to Hong Kong
2. Only applicable to Macau
3. The servicing agent(s) of Shield Up must be same as the servicing agent(s) of MPF / ORSO / Macau Pension member account and must hold relevant insurance license(s) to engage in insurance sales
4. Member can change their servicing agent(s) before applying Shield Up, either through AIA+ (approximately 13 working days) or by submitting a "Letter of Appointment of Exclusive Agent(s)" (approximately 1 month)
5. If member applies Shield Up via AIA+ (Only applicable to Hong Kong) or specified QR code / URL, the case will be assigned to the servicing agent(s) of group insurance scheme
6. Click here to view the Dos and Don'ts
7. Including AIA MPF Personal Account, Preferential Deferred Member Plan and Deferred Member Account</td></tr>
<tr><td>Promotion Templates:</td><td>The latest "Shield Up" Promotion Email Templates have been uploaded to eAC for you to download at any time and share them with employers or Human Resources Departments so that they can forward it to employees to keep abreast of the latest customer offers*.

<u>Only Applicable to Group Insurance Members</u>:
Path: eAC > Departments > Corporate Solutions > Employee Benefits Representative's Corner > Agency Activities > Marketing > Worksite Marketing > Worksite Marketing Tool
1) "Shield Up" Promotion Email Template - HR Version (Click here to view)
2) "Shield Up" Promotion Email Template - Employee Version (Click here to view)
3) "Shield Up" Promotion Poster Template (Click here to view)

<u>Only Applicable to MPF / ORSO / Macau Pension Members:</u>
Path: eAC > Useful Links > MPF > Tools > Useful Information
1) "Shield Up" Promotion Email Template - HR Version (Click here to view)
2) "Shield Up" Promotion Email Template - Employee Version (Click here to view)
3) "Shield Up" Promotion Poster Template (Click here to view)

Financial Planners must have completed the Shield Up Cancer Protection Plan Online Training and Internal License Test (Path: iAcademy > eLearning Training > Internal License > Corporate Solutions Product > Shield Up Cancer Protection Plan Online Training and Internal License Test)</td></tr>
<tr><td>Member Online Application Flow:</td><td>Please click here to view the details</td></tr>
<tr><td>Financial Planner iPoS Form Filling Steps:</td><td>Please click here to view the details</td></tr>
</table>

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Important Note:	According to AIA Personal Information Collection Statement (PICS), in relation to any personal data collected by AIA whilst providing any services in respect of our mandatory provident fund scheme ("MPF") and occupational retirement schemes ("ORSO"), such personal data would only be used for promoting or marketing any MPF and / or ORSO products or services. Such information obtained is used for performing MPF and / or ORSO functions. Please note that you (a) must not disclose such information to any other person for performing non-MPF and / or non-ORSO functions; (b) must not cross-selling non-MPF and / or non-ORSO products or services by accessing such information. Must not directly or indirectly offer any gifts and incentives to induce customers to join AIA MPF scheme and purchase AIA insurance products.

If you have any questions, please contact your designated CSBD Agency executives / IVS Team.

Yours faithfully,

Winnie Fung
Head of Individual Voluntary Solutions
CS – Individual Voluntary Solutions

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